



Duty Statement

Classification: **Staff Services Analyst**

Position Number: **275-190-5157-910**

HCM#: **9368** **JC-334649**

Branch/Section: **Customer Experience Division/ Resource, Planning & Performance Section/Frontline Agent Readiness & Mentorship (FARM) Team 1**

Location: **Sacramento, CA**

Telework: Remote-centered

Working Title: **Customer Contact Center Analyst**

Effective Date: **January 1, 2022**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: ☐ Yes ☒ No

The CalPERS Customer Experience Division (CXD) is the first point of contact for CalPERS customers, providing customer services and education via multiple channels, including phone and electronic correspondence, concerning retirement and health benefits. This requires applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, legislation, and policy initiatives.

Under the supervision of a Staff Services Manager I (SSM I), the Staff Service Analyst (SSA) is responsible for performing consultative and analytical duties in order to support the customer service goals and objectives of the Division as well as the Organization.

Duties include, but are not limited to:

Essential Functions

- 45% Provide customers with information and assistance via telephone on a variety of topics and services provided by CalPERS, including but not limited to: the completion of health, dental, and retirement transactions, purchase of service credit, death benefits, retirement allowance options, community property, payroll issues, membership questions, and employer contracts. Provide information on requirements for health and dental enrollments, explain membership eligibility criteria, adjustment processes, and contract and payroll requirements, as needed. Assist customer with establishing, accessing, and/or navigating their account in myCalPERS. Ensure that all inquiries are responded to within agreed upon service level expectations in a professional and courteous manner while adhering to CXD policies, procedures, expectations, and key performance indicators. Accurately document all information and actions to customer's accounts in a clear and concise manner in accordance with the Division's guidelines. Demonstrate the ability to type at a speed and proficiency to meet performance expectations.
- 35% Respond to phone calls, written, and electronic inquiries from customers (active and retired members, employers, beneficiaries, and the general public) and provide information regarding CalPERS retirement and health programs. Research and apply the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, legislation, and all Division or Enterprise policies and procedures when responding to customer inquiries. Determine when issues need to be referred to an appropriate division for a more thorough response and make referrals on a timely basis and in accordance with division procedures.

- 10% Stay apprised of changes or updates to Division or Enterprise policies or procedures. Attend meetings and trainings as scheduled.

Marginal Functions

- 5% Collect and analyze data related to operations, participate on project teams, and make recommendations for procedural changes to streamline processes and improve customer service on issues related to the CXD Customer Contact Center.
- 5% Perform other duties as assigned that are appropriate for the classification.

Knowledge, Skills and Abilities

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; governmental functions and organization.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work.

Desirable Qualifications

- Demonstrates excellent attendance and punctuality
- Strong organizational skills and time management skills
- Call center or other customer service industry background
- Demonstrates the ability to be detail oriented and attentive
- Possess basic computer skills and software application use
- Ability to work in a fast-paced environment, set priorities, and meet deadlines
- Ability to effectively align with and implement management direction and decisions
- Demonstrates a positive attitude, flexibility, and dependability in all workplace activities
- Ability to interpret and apply provisions of law, court decisions, and departmental policies
- Demonstrates excellent verbal and written communication skills and strong organizational skills
- Customer Service oriented, demonstrates professional customer service skills, and strong interpersonal skills
- Ability to work independently, exercise good judgment in all work-related activities, and work effectively with sensitive subject matter
- Knowledge of the Public Employees' Retirement Law (PERL), Public Employees' Medical and Health Care Act (PEMHCA) rules and regulations, departmental policies and procedures, and other related statutes, laws, rules, regulations, and legislation

Working Conditions

- Continuous interactions with customers on the phone
- Use of a computer mouse and intermittent keyboarding is required
- Sitting, standing, and phone requirements consistent with Contact Center work; motorized workstations and wired headsets are used to allow for mobility while working
- Office setting with artificial light and temperature control

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent and reliable attendance

- Ability to demonstrate punctuality, initiative, and dependability
- Ability to meet performance expectations
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance)

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature: _____ **Date:**

I certify that the above accurately represent the duties of the position.

Supervisor Signature: _____ **Date:**